

Examples of Visions for Charter Schools

Remember, a vision statement describes what you want your charter school to look like in ideal terms in the future – the results you will be achieving and characteristics your charter school will need to possess in order to achieve those results. The strategic vision statement provides direction and inspiration for charter school goal setting.

George Washington Carver Elementary School, Coral Gables, FL

Our vision for George Washington Carver Elementary School is one where children are educated through a collaborative effort among parents, faculty, staff, students, and the community. Our school environment encourages children to take risks and become creative producers without fear of failure. Through cooperation and a unity of spirit, challenges become opportunities where achievements are recognized and celebrated. The potential of all children to become self-directed lifelong learners permeates the expectations of the Carver family.

Coeur d'Alene High School, Coeur d'Alene, ID

Coeur d'Alene High School will forge a new and powerful model of education, ensuring a bright future for its students. Coeur d'Alene High School will be a place where students are motivated to learn with the help of quality instruction and leading-edge technology. Students will graduate with the knowledge and skills they need to compete and excel in an increasingly technology-based world. Families, communities, and educator will come together to prepare knowledgeable citizens for the world of tomorrow. Society will be enriched as everyone contributes to his or her own well-being and that of others. Coeur d'Alene High School commits itself to the vision for its future and the future of its students.

Wonderland Charter School, State College, PA

Wonderland Charter School is a full-day kindergarten only school whose vision is that each child is an individual that requires an educational model to recognize in detail each child's strengths and weaknesses. The traditional 'one-size fits all' educational model allows many children to drop through the crack, not to develop to their full potential, or to develop into discipline problems with a commensurate disdain for school. The education that each child needs to receive has to be geared to their specific needs. Weaknesses must be overcome and strengths must be enhanced to bolster their self-esteem and provide a solid foundation for future schooling. Our vision is to meet each child's needs educationally, emotionally, and socially before they enter first grade.

Examples of Missions for Charter Schools

Your mission statement is a broad description of what you do, with/for whom you do it, your distinctive competence, and WHY you do it. It is a statement that is true today.

EduPreneurship Student Center, Scottsdale, AZ

Edupreneurship is dedicated to providing children with an education that will enable them to be successful in today's complex society. Creating a learning environment that is relevant, active, and product-oriented to ensure our children stay turned on and tuned in is essential to the education process. We believe in practicing the precepts of a Democratic society by students holding themselves accountable for their own actions, thus preparing them to be good citizens.

Neighborhood House Charter School, Boston, MA

The Neighborhood House Charter School of Boston believes that the underpinning of change relies on the creation of a learning community, where everyone has something to learn and something to teach. The mission of the school is to develop in each child the love of learning, and ability to nurture family members, friends, and self, the ability to engage in critical thinking, and to demonstrate complete mastery of the academic building blocks necessary for a successful future.

Public School 2005, Milwaukie, OR

The mission of Public School 2005 (PS 2005) is to recognize and nurture all human intelligence so that students and staff of varied cultural and social backgrounds will achieve their full intellectual and social potential. The founders envision a school that creates an inclusive community working together to support student achievement and a strong sense of self-worth. The school will offer a comprehensive educational program by placing a strong emphasis on K-6 core curriculum while infusing second language and the arts. PS 2005 will foster an environment where students, parents, staff, and the community are partners in the educational process and achievement of all children.

Horizons Community High School, Wyoming, MI

We believe that people are empowered by their independent use of information technologies and that they are united by opportunities to share resources and communicate in our local and global communities. In this Information Age, it is essential that Horizons commit to preparing its students to work in an evolving information-centered, global community. Given the rapid pace of technological change and the growth of information technologies in all aspects of our lives, it is critical that students become familiar with the tools of information technology. All students and staff must be competent in using these tools to obtain information, to communicate, and to solve problems.

Examples of Value Statements for Charter Schools

Values are beliefs that people involved in your Charter School hold in common and endeavor to put into practice. These values guide you in defining and performing your work. Values define behaviors embraced by all stakeholders (board members, administrators, faculty, staff, students, and parents).

The Charter School of San Diego, San Diego, CA

CSSD employs individuals who are oriented for success at CSSD. This brief outline of absolute values identifies for the candidate the key concepts upon which the school was established and operates.

- *Kids come first.*
- *Education at CSSD is personalized, individualized, and high quality.*
- *CSSD is made up of a community of highly professional people. These committed individuals are independent, self-motivated, high-energy people who speak for themselves. They work to create a positive, challenging environment that is centered on teaching and learning.*
- *CSSD is committed to the creation of educational reform models centered on how effective educational organizations run, how teachers teach, and students learn.*
- *CSSD employees are accountable for their work.*
- *People-centered teams focus on supporting quality teaching and learning. Performance is measured on a variety of indicators that include productivity, credit ratio, auditability, quality, performance and commitment to the vision of CSSD.*
- *CSSD is committed to the improvement of the quality of life for students, their families and the community at large.*
- *CSSD uses business principles in managing the school.*

Explore Charter School, Brooklyn, NY

At Explore, we set very high goals for our students. At the same time, we believe that how we operate to achieve those goals is just as important as the goals themselves. Therefore, every member of Explore's team is expected to operate using the following organizational operating values:

OUR COMMUNICATION IS DIRECT AND SENSITIVE.

- *Our communication is characterized by active listening and an understanding of different perspectives.*
- *Our tone is patient.*
- *Time and place is considered when raising issues.*

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- *We directly and pro-actively communicate any challenges that may impact our ability to fulfill our professional duties.*
- *Our writing is revised and checked to be error-free.*

WE MAKE THINGS HAPPEN.

- *We reflect on past endeavors, learn new skills, and make changes.*
- *Our actions demonstrate a balance between a sense of urgency and careful and strategic planning.*
- *We ask for help if we need it.*
- *Our actions are characterized by a desire to meet goals.*

WE ARE FLEXIBLE.

- *Our actions demonstrate a willingness to go above and beyond the call of duty.*
- *Our actions demonstrate a willingness to try new ideas.*

WE ARE PROFESSIONAL.

- *We fulfill our professional responsibilities, as outlined in our job descriptions.*
- *Our actions show that we recognize we are a member of a team and that our individual performance impacts Explore's overall achievement of its mission.*
- *We are punctual to work; we submit paperwork on time; we complete tasks within the time allotted.*

Voyager Charter School, Garnet Valley, PA

1) Education First

At Voyager, education is our primary business. Activities that seek and support educational excellence shall be given priority over those that do not. The basic role of teachers is to help children learn.

2) Quality

Beginning in first grade and continuing through school, the subject of quality and how it relates to school work is discussed with students. Students, parents and teachers challenge students to do their very best. It is not our goal to have students merely completing assignments without attempting to produce a quality product.

3) Hard Work

Creating high quality work is not always easy. We are committed to making learning interesting, exciting and fun, as much as possible. However, we recognize, and want parents and students to recognize, that while learning is not always easy, it is fundamental.

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4) Life-long Learning

We recognize that learning does not begin or end with school. We want students to learn skills that will allow them to continue to direct their own learning. The essence of this is independence and self-reliance.

5) Love of Learning

Children need to learn to love learning as its own reward. We encourage students to focus on internal rewards and motivations, rather than being dependent on external rewards.

6) Self-esteem

We believe that self-esteem is built upon competence. We can, and do, praise children appropriately, but we do not engage in false praise. We actively assist and encourage children in their journey towards competency. We want them to take pride in what they do well. We also want our students to believe that they can make a difference in the world.

7) Respect

We strive to create a climate of mutual respect among students, parents, staff and community members. Students are expected to show respect to others, and can, in turn, expect to be treated with respect by others.

8) Personal Responsibility

We expect students to take personal responsibility for their own learning. We cannot teach them anything if they are determined not to learn. We also expect them to take personal responsibility for their actions and to be willing to accept the consequences.

9) Responsibility to Others

Any member of a community has some responsibilities to his neighbor. Our students have some special abilities that carry with them greater opportunities to serve. We want students to understand the contributions they can make to society and to act responsively.

10) Role Models

We have high expectations for our students. We, as parents and staff, are committed to serving as appropriate role models for our students. We need to demonstrate our values to our students on a daily basis in our own behavior. We cannot reasonably expect from them that which we are not willing to do ourselves.

11) Diversity

We live in a diverse society. Students need to understand and respect differences, while seeking to find common ground. Students also need to understand and evaluate different opinions and intellectual perspectives. All of this is an integral part of our curriculum.

12) Continual Improvement

We have adopted the Japanese philosophy of Kaizen or continuous improvement. We acknowledge and recognize effort; celebrate the achievement of benchmarks and milestones; and strive to get better each and every day.

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Charter School

Board and Committee Member Matrix

Board Positions	Candidates	Organization	Title or Responsibility	Notes	Board Experience	Parent	Financial	Legal
Executive Committee								
President								
Vice President								
Secretary								
Treasurer								
Committee Chairs								
Development (fundraising strategy, sustainability)								
Marketing and Communications (website, newsletter, PR, brochure, etc.)								
Facilities Management								
Curriculum Development								
Etc.								
Committee Members								
Joanne Smith								
Etc.								
Notes:								

Add candidates by position, add as many lines as you need for each position

Mark qualifications desired for each position with an "X"

List all board positions

If candidate has a desired qualification, note in bold

If candidate has another qualification, note with "+"

Keep a candidate list separate, maybe below and plug them into positions

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Charter School

Board Positions	Marketing & Communication	Strategic Planning	Fundraising	Non-Profit	Education	Self Employed	Government
<i>Executive Committee</i>							
President							
Vice President							
Secretary							
Treasurer							
<i>Committee Chairs</i>							
Development (fundraising strategy, sustainability)							
Marketing and Communications (website, newsletter, PR, brochure, etc.)							
Facilities Management							
Curriculum Development							
Etc.							
<i>Committee Members</i>							
Joanne Smith							
Etc.							
Notes:							

Add candidates by position, add as many lines as you need for each position

Division of Roles between Board and Administrator

Adapted from "Building and Managing an Effective Board of Directors", Center for Nonprofit Management in Southern California

This chart describes the roles and responsibilities of the board and the charter school administrator in critical areas. Review each entry and revise as based on the specific needs and requirements of your charter school. This chart should be reviewed on an annual basis and updated as necessary.

Responsibility	Board of Directors	Administrator
<i>Legal</i>	<ul style="list-style-type: none">Exercises fiduciary role to ensure that the charter school is properly managed. The board should have a mechanism to validate information from the administrator.Maintains legal status; insures the proper paperwork is submitted to governmental agencies.Reviews financial and business dealings and exercises proper judgment in self-dealing transactions – avoidance of conflicts of interest.	<ul style="list-style-type: none">Must provide information to the board to demonstrate that the charter school is well managed.Compiles information for annual filing requirements.Signals to the board if either of the above situations is likely to occur.
<i>Finance and Accounting</i>	<ul style="list-style-type: none">Approves annual budget.Reviews periodic financial reports (balance sheet, income statement, changes in financial position).Ensures that proper internal controls are in place.	<ul style="list-style-type: none">Prepares annual budget with input from staff and finance committee.Oversees preparation of periodic financial reports.Implements proper financial controls.

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Responsibility	Board of Directors	Administrator
<i>Planning</i>	<ul style="list-style-type: none"> Establishes mission and program direction for the charter school and approves goals and objectives designed to achieve those ends. Reviews strategic plan and progress. Assesses compliance/progress in achieving educational and other outcomes agreed to in the charter contract. Assesses program evaluation plan. 	<ul style="list-style-type: none"> Participates in establishing mission and program direction for the charter school. Contributes to vision of the charter school; and assists the board in maintaining focus and momentum for the charter school. Develops specific program goals and objectives based on the board specific mission. Develops reports or oversees staff development of reports to demonstrate program progress.
<i>Policy</i>	<ul style="list-style-type: none"> Develop and adopt written policies. Responsible for reviewing policies periodically. 	<ul style="list-style-type: none"> Identifies need for new policies. Responsible for assuring the implementation of policies and for assisting the board in analyzing policy options.
<i>Personnel</i>	<ul style="list-style-type: none"> Sets and reviews personnel policies. Hires Charter School Administrator and evaluates the administrator's performance. 	<ul style="list-style-type: none"> Implements personnel policies. Recommends changes in personnel policies to the board. Hires all personnel and evaluates performance of staff members (or delegates to appropriate supervisor).
<i>Resource Development</i>	<ul style="list-style-type: none"> Responsible for assuring long-range commitments of resources; establishes a fund development plan and participates in its implementation. Reviews and approves all major grant proposals. 	<ul style="list-style-type: none"> Conduct research and maintain information database. Assist in fund development efforts. Develops grants and other funding applications, plans fundraising events, enters business ventures to support mission.
<i>Board Accountability</i>	<ul style="list-style-type: none"> Establishes and communicates clear expectations of Board directorship. Assures effective participation of Board directors. 	<ul style="list-style-type: none"> Facilitates training and information exchange for members in preparation for selection of Board directors. Facilitates effective communication among Board directors.

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Responsibility	Board of Directors	Administrator
<i>Decision Making</i>	<ul style="list-style-type: none">• Defines and communicates the role of Board, administrator in making decisions.• Assures appropriate involvement of Board directors in charter school decision making.	<ul style="list-style-type: none">• Makes action decisions within parameters set by the Board, collaborates both with the other staff and Board in some decisions.
<i>Community Relations</i>	<ul style="list-style-type: none">• Promotes the charter school to parents and the general public, including serving as an emissary of the charter school to the broader community.• Promotes cooperative action with other charter schools when the charter school should take part in coalitions, shared programs, joint action, etc.	<ul style="list-style-type: none">• Interprets the mission of the charter school to the community through direct involvement, public relations programs, including personal contact, descriptive program literature, and work with the media; works closely with the Board for an effective division of labor.
<i>Contracts</i>	<ul style="list-style-type: none">• Approves contracts.	<ul style="list-style-type: none">• Manages contracts.
<i>Other</i>	<ul style="list-style-type: none">•	<ul style="list-style-type: none">•

Example of Head of School Job Description

The head of school is the sole employee of the board of trustees. In situations with very large schools and multiple divisions and/or campuses, often there is a president and one or more school heads. In those instances, the following job description is "divided" between president and school head(s), as mutually agreed upon by the president and the board of trustees.

Position Title: Head of School

Reports To: Charter School Board of Directors

Summary

The Head of School is responsible for overall operations of the school. S/he is a member ex officio of all standing committees of the Board, represents the Board to faculty/staff and students/families of the school, and sees that the general policies of the Board are understood and followed. S/he hires faculty and administration, holds regular meetings of the faculty and staff, and supervises and coordinates the activities of the entire organization.

Essential Duties and Responsibilities

The Head of School:

Board Relations

- Works with the board of trustees, its chair, and its committees in carrying out established school policies; reviews those policies and make recommendations for changes; attends meetings, prepares reports, maintains board records, and keeps trustees informed on all aspects of the school's operation.
- Provides to the board of trustees various scenarios and possibilities for the board to consider as it does its work focusing on the strategic future of the school.

Operations Management

- Supervises all programs of the school (academic, athletic, ethical, and other extracurricular programs); monitors curriculum, grading, testing, and reporting to parents; prepares for and conducts periodic program evaluations; submits reports to external agencies as required; establishes disciplinary policies and standards of conduct.
- Manages the sometimes competing demands of the various constituencies of the school.

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Strategic Development

- Articulates the vision for the school and its future.
- Monitors and addresses all matters of school climate and culture.
- Embodies, manifests, and advocates the mission of the school.

Staff Management

- Handles all matters regarding employment, retention, and dismissal of personnel, salaries and contracts, job assignments and performance evaluation, and orientation and training
- Prepares employee handbooks, and maintains appropriate personnel records.
- Supervises the admissions director in determining programs for the recruitment of students, including marketing and outreach, information dissemination, applicant testing and interviews and acceptance and decisions.
- Supervises the development director and development efforts to cultivate and affect generous support of the school.
- Supervises the business manager in the preparation of preliminary and final budgets; monitors income, expenditures, collections, and cash flow; maintains appropriate financial records; oversees the employee benefit program.
- Supervises the college counselor in planning for an appropriate program for college guidance and college admissions.

Marketing and Public Relations

- Represents the school to all of its constituents including neighborhood, parents, students, alumni, business community, faculty, and staff.
- Represents the school in its relations with state and federal agencies and with local, state, regional, and national educational organizations and accrediting agencies.

Performance Management Plan Example

Employee Information		Performance Review Information	
Name:		Period Evaluated:	
Position:		Reviewed By:	
Employee Salary:		Review Date:	
Manager:		Next Review Date:	

Position Plan/Responsibilities of Job

Insert relevant job responsibility information here ...

Overall Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Manager/Reviewer Comments

Insert comments from manager/reviewer here ...

Manager Signature:_____

Signature indicates manager set objectives and measures for the coming year and conducted the annual review.

Employee Comments

Insert comments from employee here ...

Employee Signature:_____

Signature indicates employee has received annual review and objectives and measures for the coming year.

Organizational Goals Supported

Goal #1:

Corresponding Employee Objective:

Goal #2:

Corresponding Employee Objective:

Goal #3:

Corresponding Employee Objective:

Comments:

Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Team Goals Supported

Goal #1:

- Description:
- Specific Objective:
- Measurement:
- Comments:

Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Goal #2:

- Description:
- Specific Objective:
- Measurement:
- Comments:

Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Personal Developmental Goals (Technical, Professional Knowledge, Skills or Behaviors)

Goal #1:

- **Description:**
- **Specific Objective:**
- **Measurement:**
- **Comments:**

Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Goal #2:

- **Description:**
- **Specific Objective:**
- **Measurement:**
- **Comments:**

Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Example of Status Report for Board Members and Administration

REPORT NAME

Date of Report

Leader or Manager Authoring Report: <Name>

Distribution List for Report: <List of Names in Audience for Report>

Scope of Responsibilities:

A brief description of the scope of the committee, task force, or position.

1. Summary

A brief statement of performance covered since the last report. Summary should be bulleted and no more than 5 key points.

2. Milestones Achieved since Last Report

Goal/Objective/Task	Target Date	Completion Date
Description of goal, objective, or task		

3. Milestones Scheduled For the Next Reporting Period

Goal/Objective/Task	Target Date	Current Status
Description of goal, objective, or task		

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5. General Information

Include any general comments that may support/enhance/add to the above sections.

6. Budget

Date	Planned Expenditure	Actual Expenditure	Deficit/Surplus

7. Issues

Provide a brief description of any business issues associated with the project that have arisen since the previous report and needs to be addressed by the Board.

8. Recommendations

Here is where to insert a brief description of recommendations for the Board to consider and/or endorse.

Example of Fundraising Plan for Charter Schools

A fundraising plan sets goals for the charter school's income, typically over a three to five year period. The plan should incorporate specific objectives and action steps that will help the charter school acquire and effectively use the financial resources it needs.

Summary

The goal of this overview is to lay out a strategy of fundraising that combined with tuition revenue will create financial sustainability for the Charter School. Fund development is an ongoing, rewarding process that engages all staff and every board member in some way. This document (and attachments) will become part of the Strategic Plan and should be reviewed and updated on a regular basis by the Development Committee of the Board of Directors.

Fund development provides a mix of funding that will sustain basic operations, allow for expansion of educational programs, and generate sufficient cash flow to cover operating costs. Activity associated with strengthening fund development should be taking place every day at the Charter School. It is vital to the sustainability of the school to place as high a priority on fund development as any other organizational component.

To some, fund development means having a bake sale or applying for a grant. It can and should be so much more. Fund development does include those activities, but *effective* fund development produces more than money. Fund development includes building stronger relationships, helping Board members feel comfortable asking for money, and understanding the interests of Charter School donors.

This overview will outline fundraising areas and will show projections of what needs to be raised in each area. Each area has a committee associated with it that will determine the goals and timeline for each fundraising activity. The Development Committee of the Board oversees all of the fundraising activities. The importance of preparing monthly progress reports cannot be stressed enough. These reports, prepared by the Development Director, are essential to monitoring the plan by comparing the actual results of fundraising activities with the projected incomes of each area. This information allows us to focus on activities that are productive and intervene in areas that are not.

Each year the Head of School, Development Director and the Board Development Committee work together on the development plan for the year to come and provide to the Board a written evaluation of the past year's development efforts.

Fundraising Objectives of the Charter School

- Diversify revenues in order to reduce the dependence on tuition.
- Cover the gap between tuition revenue and operating costs in order to completely fulfill the mission of the school.

The key to sustainability is to not to depend too heavily on any single source of income. A variety of fundraising activities will ensure that the Charter School has enough funding if a major source of funding is lost. Following are the areas that the Charter School needs to develop for fundraising:

Major Gifts

The Development Committee must continually strive to identify, educate and cultivate key donors who are capable of making major gifts. These are people who are either personally motivated to give because of the wonderful education the Charter School provides their children or those who are not directly involved but are impressed by what the Charter School represents.

At the Charter School all students are equally important and all potential donors are worthy of equal respect. However, from a fundraising perspective it is the donors who have been identified as having the greatest capacity to give who should receive the most time and attention from the Head of School, the Development Director, and the Board. School development personnel that focus on major gifts and major donors always raise the most money.

It is not simply a process of asking someone for money and getting it. Relationships must be cultivated and once these relationships develop into donors, they must be thanked, acknowledged, and kept informed of the ongoing successes of the school.

Timetable:

Cost:

Projected Income:

Point Person: Head of School, Development Director, Board of Directors

Strategies: Identify and create list of people with capacity

Development Director trains those making the ask

The Head of School along with members of the Board personally contact major donors who have been identified by the Development Director and work to establish a relationship with them. Adequately thank donors within 48 hours.

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Annual Fund

The Annual Fund Campaign consists of an annual appeal to Charter School families, relatives, alumni, and the Board of Directors that will raise significant, unrestricted revenue. This annual fundraising program will provide essential operating funds that are above and beyond tuition. Because tuition does not cover all of the annual costs of educating students the funds raised through the Annual Fund Campaign will help balance the operating budget which is the school's top priority.

In the future these funds will support programs directly benefiting Charter School students such as enhancing the curriculum, supporting faculty professional development, and building repairs and maintenance.

The Annual fund builds a donor database and gifts to the Annual Fund are tax deductible unlike tuition.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategies: Set financial goal.

Develop materials (letterhead, remittance envelope)

Identify donors

Create mailing list – board, staff, faculty, relatives, friends

Create letter defining need

Thank donors within 48 hours

Ensure 100% participation by Board of Directors

Special Events

Determine the signature event for Charter School fundraising. In addition to raising money for the school the event has the potential to be used to provide good publicity and public relations. This event also provides the opportunity to add names to the database, identify volunteers and record the giving amounts of attendees that will be helpful for future fundraising.

Timetable:

Cost:

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Projected Income:

Point Person: Development Director

Strategies: Establish volunteer committee(s)

Determine theme, date, location

Create materials (posters, invitations, etc)

Produce announcements for local newspapers and public service
announcements for radio and television and

Hang posters for event in area businesses.

Thank donors and attendees within one week of event.

Foundation Grants

Includes written grant requests for funding as well as corporate matching gift programs which seek to maximize support for the school from business and private foundations. The approach to foundations must be based on sound research, exemplary proposal development, and establishing relationships with foundation staff.

Timetable:

Cost:

Projected Income:

Point Person: Development Director with assistance from Education Director

Strategies: Research grant opportunities that align with the mission of the
Charter School.

Make direct personal contact with Foundation staff to review all
grant applications.

Focus efforts where you have the best chance of receiving funds.

It is important to estimate how much effort and what resources
are needed to write and administer a grant versus how much
funding the grant will generate. Is it worth writing a grant for?

Partnership Fundraising Options

These programs raise money for the Charter School through everyday activities such as grocery shopping.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategies: List the partnership opportunities in every newsletter.

Create a plan to educate families on all of the programs.

Endowment Fund/Planned Giving (or Legacy Giving)

The Endowment Fund is the financial foundation of a school. An Endowment Fund offers opportunities for individuals to contribute to the long-term stability of the school. The money is invested and remains untouched for many years and only when there is significant interest income can that income be used for either restricted or unrestricted purposes. The principle is maintained in perpetuity. The Endowment is a permanent fund that “gives back” a portion of its annual earnings to the operating budget and provides a long term strategy for stemming steep tuition hikes and securing the schools future.

Planned Giving (or Legacy Giving) allows a donor to make a gift to the school through wills, trusts, and insurance policies. This usually involves a one on one conversation with the donor to set the terms and conditions that assist the donor with estate and tax planning.

Timetable:

Cost:

Projected Income:

Point Person: Development Director

Strategy: Develop investment policy for the Charter School

Educate the Charter School community about the tax consequences of contributing to an endowment.

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Set goal for Endowment

Create informational flyer.

Conduct informational meeting for families.

Capital Campaign

A capital campaign has a limited scope and timeframe and is usually for the purpose of building a new facility or renovating an existing one, although capital campaigns can be used to fund any special project. Capital campaigns often run simultaneously with other fundraising activities. Feasibility studies to determine strategy and services of a consultant with specific expertise are often utilized to ensure success.

Timetable:

Cost:

Projected Income:

Point Person:

Strategy:

Profit & Loss Budget Example

			Budgeted
	Month 1	Month 2	School Year 1
Ordinary Income/Expense			
Income			
4100 • Tuition Revenue			
4300 • Fees			
4500 • Investment Income			
4510 • Interest-savings/short-term inv			
Total 4500 • Investment Income			
4900 • Miscellaneous revenue			
Total Income			
Expense			
5100 • Salaries & wages			
5110 • Officers & directors salaries			
5115 • Director of Development			
5120 • Salaries & wages - Full-time faculty			
5130 • Salaries & Wages - Part Time faculty			
5150 • Temporary help - Subs			
Total 5100 • Salaries & wages			
5200 • Payroll Expenses			
5210 • Payroll taxes			
5220 • Employee benefits			
5230 • Professional fees (audit)			
Total 5200 • Payroll Expenses			
5300 • Curriculum Expenses			
5310 • Curriculum Materials			
5315 • Supplies			
5310 • Curriculum Materials			
Total 5310 • Curriculum Materials			
5340 • Telephone & telecommunications			
5350 • Postage, shipping, delivery			
5370 • Printing & copying			
Total 5300 • Curriculum Expenses			
5400 • Occupancy expenses			
5410 • Rent			
5420 • Parking			
5430 • Utilities			
5440 • Janitorial			
5450 • Building Maintenance & Repairs			
Total 5400 • Occupancy expenses			
5900 • Office & Misc expenses			
5910 • Bank Fees			
5920 • Insurance (non-employee)			
5930 • Membership dues (PNAIS)			

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5940 · Professional development			
5950 · Travel & lodging			
5960 · Advertising expenses			
5970 · Computer expenses			
5990 · Miscellaneous expenses			
Total 5900 · Office & Misc expenses			
6000 · Capital Expenditures			
Total Expense			
Net Ordinary Income			
Other Income/Expense			
Other Income			
7300 · Grants			
7300 · Grants - Other			
Total 7300 · Grants			
7400 · Contributions			
7410 · Contribution - ind./bus.			
7420 · Donated services			
7440 · Community Card/Rebate Programs			
Total 7400 · Contributions			
Total Other Income			
Net Other Income			
Net Income			